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ABSTRACT

Described is the planning behind the implementation of California's new Master Plan for Special Education, and highlighted are political problems that may be encountered and techniques which can be used in getting approval for large changes in special education programing. Suggested are ways to effect needed legislation, such as by neutralizing the negative force of lobbyists for the opposition. (LS)

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POLITICS OF LONG-RANGE PLANNING FOR SPECIAL EDUCATION

BY

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THIS MONOGRAPH IS A BONUS PUBLICATION TO MEMBERS OF THE COUNCIL OF ADMINISTRATORS OF SPECIAL EDUCATION

POLITICS OF LONG-RANGE PLANNING FOR SPECIAL EDUCATION

This presentation is intended to do two things: one, provide a description of planning the implementation of California's new Master Plan for Special Education; and two, highlight some of the political problems you must expect to encounter, and the techniques which can be used in getting approval for large changes in special education programming.

On January 14, 1974, the State Board of Education adopted the California Master Plan for Special Education. The whole process of getting to that point in time was very difficult, but the work was not done by a long shot. The Master Plan represented a conceptual model which advocated all sorts of good but expensive things, like serving every child in the state, and placing a Resource Specialist in every school building in California. A piece of legislation had to be proposed which could pass the Legislature and be signed by Governor Reagan. A bill was introduced in March, 1974, which paralleled the Master Plan in content, but was scaled down to a level which could reasonably be expected to pass.

It was very important, in view of approval of a conceptual master plan which was all-encompassing, aiming at full service for <u>every</u> handicapped child, to accomplish the type of legislation which would meet three primary criteria: (1) it should accomplish true reform and restructuring of special education where the need was indicated, (2) it should meet the constitutional obligation to serve all the children; and (3) it should be a bill which had some assurance of governmental acceptance.

We never advanced, nor accepted, the premise that we were doing a bad job in special education. We did accept, and advance, the firm belief that

special education was deficient in some things, and in some aspects of service to children, and that by careful attention to these deficit areas through planning and implementation, we could do better than we were doing. I advance the concept then to all planners proposing large-scale changes (whether state, intermediate unit, or district) that formulation of the initial implementation process be based on these three fundamental goals. From these, planning of implementation strategies can proceed logically and intelligently.

In September of 1975, using $10 million of new state dollars (on top of those districts' current special education state funds), a group of six Responsible Local Agencies, approved by the State Board of Education, will implement comprehensive special education plans. An RLA may consist of one large district, two or more districts, all districts in a county with the County School Superintendent's office, or two counties together with all their combined districts.

The design called also for an appropriation of $300,000 to be made to ten additional LEA's to assist them in developing comprehensive special education plans during 1975-76. Some of these will implement those plans in 1976-77. The design would add no more LEA's during the 1977-78 year. Those implemented during 1975-76 and 1976-77 would continue, of course, and be under rigorous examination during the three-year testing and evaluation cycle. This would pinpoint design flaws in the Master Plan, and determine what actually happens to children, personnel, and school districts under a reformed and restuctured plan of special education of the type envisioned. In January, 1978, we will again go to the Legislature with the State Board of Education's final report on pupil progress and program effectiveness (we'll get to that later), and a design for further statewide implementation.

During 1974-75, in anticipation of legislative acceptance of this program, Title VI-B was used to fund competitive applications from nine RLA's for comprehensive plan development and some experimental implementation of small portions of their plans. In every instance advisory groups and planning teams, using a broad variety of persons (teachers, parents, and others), were established, consuming many additional local dollars.

The implementation design required different types of models for implementation, including single districts, multi-districts, county-wide operations, and in one instance, on the northern coast, two counties together. Also, there was an intent to select RLA's on the basis of geographical spread, rural-urban, and ethnic composition differences. A primary emphasis of selection, however, was quality of the application and firm commitment of the schools to implement the plan upon completion.

The structure of the basic implementation design was chosen from four options. The first of these entails scheduling, or legislative mandation for all LEA's in the state to plan during a certain period of time, with all LEA's in full operation by a specific, set date. Examples of this option are the 1967 Illinois reorganization and mandatory education act, and Indiana's similar 1969 comprehensive special education law.

A second option, which in some cases is no option at all but a court order, is for all LEA's in the state to plan immediately and implement quickly. Examples are the Pennsylvania decision, and most recently, the sweeping new Massachusetts Special Education Restructuring Act.

A third option which was given some consideration was to ask all LEA's in the state to add particular parts of the Master Plan mandate. For example, during a first year, all districts could design and

firm up a more adequate pupil identification system, or all LEA's could plan to meet all the needs of out-of-school handicapped kids. In California's case this option was rejected, for several reasons, in favor of implementation of all parts of the Master Plan by a selected number of school districts each year.

The fourth option is implementation by part of the LEA's in the state. Illustrative are the Maryland Continuum, Texas's Plan A, and the California Master Plan for Special Education.

The rationale for our selection of the fourth option was based on the philosophy that substantive restructuring/reorganization changes to be forced statewide should be tested, affirmed, and/or reformed from experience. Large additional cost supplements to the state can then be justified on the basis of actuality, not unproven assertion.

The decision on a specific format and content of an implementation package, or bill, can hardly go, cannot really be made, unless the special education group in the State Education Agency has the support and involvement of the top administration of the State Education Agency and the State Board of Education. The top man in California is dynamic and forceful State Superintendent of Public Instruction Wilson Riles, who is extremely popular with the people and has great influence with the Legislature. I might add that the State Superintendent has only personally testified formally on three bills during his four-plus years as State Superintendent. One of these was the Master Plan implementation bill.

In this state, the State Education Agency and the State Board of Education annually establish statewide educational priorities. The implementation of the California Master Plan for Special Education is a top priority during the current year, and will continue to be among the top seven priorities during

1975-76. What I am talking about now is the important task of "selling one's own department." To do so, it is necessary to bring on board the top program people in the department. Nine program managers, making up what is termed "The Program Matrix," meet every Tuesday afternoon. Bill Webster, Deputy Superintendent for Programs, is the boss. Other managers are Glenn Davis, Associate Superintendent for Early Childhood Education; Rex Fortune, Associate Superintendent for Intermediate and Secondary Education; and Xavier Del Buono, Associate Superintendent for Adult Education. Assistant Superintendents and Program Managers are Bill May, General Education; Bill Whiteneck, Child Development; Sam Barrett, Vocational Education; Manuel Ceja, Compensatory Education; and I represent Special Education.

A critical task in getting Special Education on the top priority list is to sell those who may be the most important persons of all...those 2-4 persons in the Department, or the district, who in the California State Education Agency we refer to as the Superintendent's "Kitchen Cabinent." There are always a few persons in any bureaucracy who usually are not part of the professional education staff, but who have the immediate ear of the Superintendent. Obviously, you have to sell these people on the goodness of the program.

Of course, accomplishment of the job of selling the Department is not the end of the battle. The tougher parts come next! If, during the development of a state comprehensive special education plan you have involved the field heavily, they are not about to bow out when things get down to the nitty-gritty. In many ways it might be easier for the State Education Agency people if they would, due to the nature of politics and the process used in getting a bill passed. In similar manner, once the local Director of Special Education gets ready to get his local Board to implement a major change or plan, he might

consider the task easier if his constituency would let him go about it without further help. However, that luxury will never be available to special education persons in State Education Agencies; nor should it be, since we are only one small part of the total special education system having a current and future stake in how handicapped children are served. So, special education teachers, local special education directors, university faculty, regular education organization people, and parents of the handicapped want to be involved; and further, will insist on it! You've heard about Murphy's Law...I offer Brinegar's Law:

> Any state which sets out to develop a master plan should recognize that the problem of communicating with the field will be the greatest single problem...satisfying the field will be impossible!

Following the process of developing a statewide master plan of some significance, what we wanted from the Legislature (and ultimately approval by the Governor) was an appropriation of dollars so that more facilities and more services for the handicapped can be provided. Someone has said that the universal of the problem of getting that achieved is the number of people in your State Legislature reduced down to their critical components. Basically, the critical components amount to a majority of the key policy committee members in the Legislature and a similar majority of the persons on the finance committees, plus a key 3-4 others. like the Speaker of the House! If you get these committed to your side the battle is largely over...but, this may not be easy!

Often, the procedure chosen by us is the "grassroots" approach. That's when you go out all over the state and build up widespread people support. The idea is to get involvement, and you do! The accompanying problem is that, while you're drumming up support, you dredge up all sorts of opposing individuals and organizations, who, in turn, try to take away your

support in the Legislature.

When you want to get a very critical piece of legislation through, you must know precisely where the lobbyists for the opposition are. They are the ones you must concentrate on. You must know exactly how to take them out of the action! In other words, you've got to neutralize their negative force. It means doing a lot of homework which you can never do enough of.

I think it is fair to state that many school psychologists in our state were not too enamored of this bill, because their roles were not as precisely described nor as prominent as they wanted them to be. Through some compromise in the change of a few key clauses in the bill, and much negotiating, the school psychologists as a group were able to live with the measure, and perhaps see potential improvement in overall services to children resulting from the changes.

In another instance, a school administrator threatened to organize a lobby group to kill the bill, and actually did make an attempt through his own legislators. In this instance it wasn't possible to completely work out his opposition through negotiation and compromise; thus we had to neutralize his negative influence.

A rule you should make note of is that you can count on having to counter each negative influence with five positive offsetting influences. I learned this from Aris Mallas, an expert in the use of power techniques, who assisted the Texas Education Agency in the development of the Texas Plan. I had many opportunities to use this principle, while helping to get the Master Plan passed, and it works!

This past August the implementing bill was signed by then-Governor Ronald Reagan. With that approval, the beginnings of state staff reorganization came about. The acronym "IMPACT" stands for

Implementation of the Master Plan Activities Coordination Team. Dr. Allan Simmons, formerly Chief of our Bureau for Mentally Exceptional Children, was appointed director. Joining him were Bob Clark federal programs consultant; Bob Gartin, OH consultant; Clif Shryock, MR program consultant; and Gerry Peterson, consultant for Development Centers. Also, Dr. Ernie Jackson joined us from a Bay Area District, as did Dr. Eunice Cox, a professor of learning disabilities from the University of the Pacific, formerly at Queens College, New York. Also, two full-time evaluation consultants were assigned to work with the team.

The task that faces us is to translate a philosophical and conceptual framework containing significant school restructuring mandates (but which were often purposefully vague) into specific guidelines, and, eventually, rules and regulations which will get the job done for children without rebuilding the rigidities of regulation which we're trying to get rid of. IMPACT's job is to provide technical assistance to the planning schools. Rather than preparing definitive, precise guidelines, we elected to let guidelines emerge gradually as experienced by the first group of planning schools, and generally to be established jointly by the schools and the State Education Agency. Many questions, however, began to emerge:

A. What does a school comprehensive plan look like?
B. Must we be 100% in operation at once?
C. What qualifications for Resource Specialist? A major innovation of the Master Plan is the provision for a Resource Specialist for each 500 pupil population, or generally one per building. Since this professional person becomes an important part of special education restructuring, the question of qualification becomes critical. Also, the determination of the respective roles of the Resource Specialist and the Program Specialist loomed into importance.

Of great concern to the planning schools, and to us, are the population limits of the children special education serves. This is particularly true here, because the Master Plan mandates service to all kids, while at the same time it moves us toward a non-categorical format. Therefore the Identification, Instruction, and Instructional Planning component of the Master Plan will need more specification in the guidelines.

A critical factor facing both the schools and the State Education Agency is that, following a three-year first phase effort, the State Education Agency must demonstrate the results of Master Plan changes on the pupils in these schools; and, on the basis of those results, present a legislative package in January, 1978, which will request funding to enable statewide implementation.

The essential and critical elements in special education evaluation have been defined. Perhaps the most difficult is that of severity. We can find little in the literature which helps us in the building of an information system which properly accounts for this variable. We must also develop systems which will demonstrate what happens when the intensity and the frequency of integration of handicapped children is increased. We intend to increase local and state involvement in pupil progress and program outcomes at a marked rate. Are those enrolled served well? What constitutes pupil growth and development, and how do we effectively measure it? And, of course, pupil identification. Is the system complete and thorough, and how do we know it?

Because we have built for ourselves annual reporting requirements in some incredibly difficult areas, IMPACT has had to establish a precise work plan. The work plan delineates twelve objectives, and further sets forth specific activities which must be followed in order to achieve the objectives.

In the first objective, there are fifteen activities which must be accomplished. The work plan lists the date on which each activity is to be completed, and how many days each activity requires. For example, in Activity #1, completion will require one day of one IMPACT member plus one secretarial day. Activity #2 will require three man days from other persons, either from the total special education staff or from some other unit within the Department. On the actual work plan, the activity itself is written out. If anyone is interested, I'd be happy to provide you with a copy of the work plan, complete with flow charts, etc.

Objective #7 related to a planned program for inservice education of persons in the field involved in the planning and implementation task. The implementation design was built on the assumption of possible error in some of the component parts of the Master Plan. We intend to test/evaluate and restructure the Master Plan, probably annually, during the first three years of actual implementation.

The ninth objective is tremendously important. No single district has in operation a management information system which appears to collect and analyze the kinds of data which either it or the state needs to fulfill Master Plan requirements. Activities have been specified which will, we hope, give us a compatible Management Information System with common data elements needed by both local schools and the State Education Agency. There are also corresponding evaluation activities.

Finally, IMPACT has the responsibility for building working relationships with other highly pertinent units within the Department, in order to effect appropriate interface between the Master Plan and other Department and local efforts. And it has responsibility for working directly with the six county and district groups approved by the State Board of Educa-

tion to implement comprehensive plans next September. In addition to the six RLA's which will be operating this September, ten additional districts or consortiums of districts and counties have been awarded state planning grants to assist them in the development of comprehensive special education plans.

Now, what would we have done differently if we were to do it all over? On getting the implementing bill passed, we would have placed earlier concentration on the critical components of the Legislature. We would have started a much earlier compaign to capture each of these key legislators. This usually requires the discovery of one or two of their constituents who can effectively influence them. It would be very important to me that these particular legislators be more than marginally knowledgeable about the basic contents of the measure. In the final analysis we were able to win over one of our most conservative "no" votes, because luckily at the last minute we found a person in the legislator's community who was able to convince this particular legislator to vote "yes." Often this influential person is someone other than a local special education person. A better planned, more consistent, earlier approach would have removed this particular legislative obstacle earlier in the game.

At the same time, I would not again make the all-out effort we tried on the grass-roots approach so early in the game. This actually weakened our effort, since we uncovered so many individuals and small groups who mounted many offensives on non-substantive issues, and it required a heck of a lot of time to neutralize their negative efforts. The time it took to do this could have been used more constructively in working with leaders of our ally groups and organizations, though, but in such a way as to allow them the opportunity to bring along their own members.

The first of these ally groups is the statewide

special education professional and parent groups. The second is the statewide non-special education groups and organizations. In some cases, school districts and county school offices have their own lobbyists in the Capitol. These are most important. In our state school lobbyists are employed by Los Angeles, San Francisco, Los Angeles County, Riverside County, San Deigo, and a few others. These individuals work full-time in the Capitol during the legislative sessions, and often control a lot of votes. It's important to keep them fully apprised of the operation, because you will need their help. Perhaps more important, you don't need their opposition!

Next, I would establish very early in the game a formal structure for the organization of a portion of our own staff with a very precise and complete game plan. I would arrange earlier that they have uninterrupted time for this total activity.

Why the emphasis on restructuring and long-range planning? Many handicapped children are on waiting lists for educational services, but are not being served. Improved management information systems and better pupil progress and program effectiveness evaluation should contribute toward improving education for our children. We must seek to equalize opportunities for all children in need of special education, from those for whom even the smallest degree of development and independence can be considered success to those others with outstanding abilities who are capable of the highest levels of achievement. We, in education, must remain continually aware that the child--the student--is the end purpose of our efforts. He is not to be regarded as the passive recipient of the instructional resources we offer and the educational systems we administer, but as a unique individual whose curiosity and potential deserve the special attention of all of our combined adult energies.